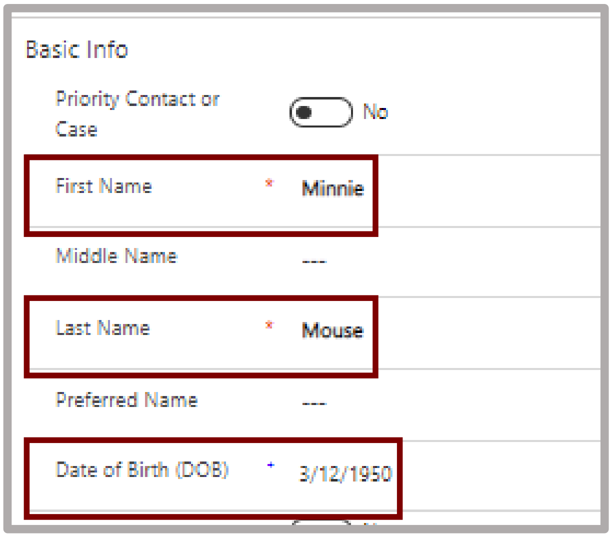
CCTO Micro-Training

# Entering A Contact: 6 Steps

**Fields with * are required to create your contact.**
**Fields with + are required by the state to track data.**

**Click** [Contacts] at the left of the screen and then **select** [+ New] at the top.

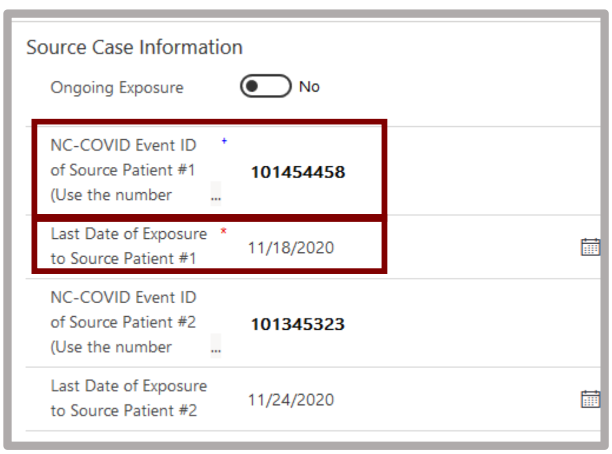
*Please note that you do not need to touch any of the fields in the **Record Info** box when entering a contact.*




## #1: Basic Info

- First Name*
- Last Name*
- Date of Birth+ *(necessary for digital outreach)*

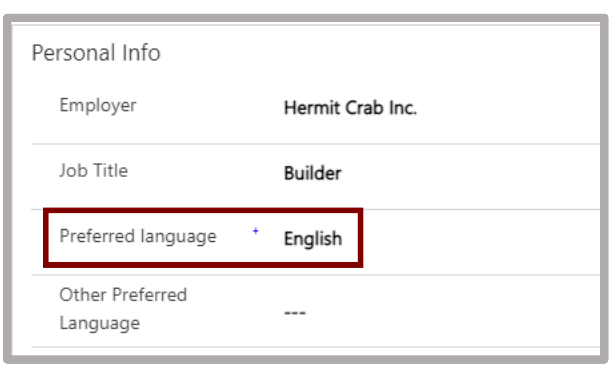
The **Priority Case or Contact** toggle allows you to flag a contact who is higher priority to receive a phone call. **Check with your supervisor and your local policies to see if you should be using this toggle.**




## #2: Source Case Information

- Ongoing Exposure *(if, for example, your contact lives with a case patient)*
- NC-COVID Event ID+
- Last Date of Exposure*

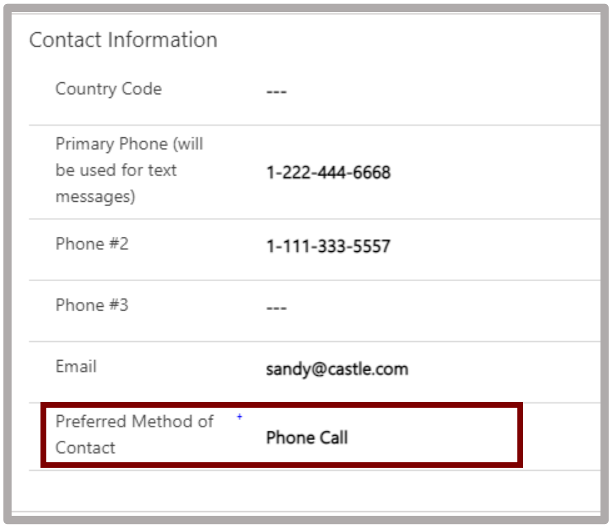
*If you do not have an NC-COVID Event ID, include Source Patient Name and Birthdate.*




## #3: Personal Info

- Employer *(if known)*
- Preferred Language+

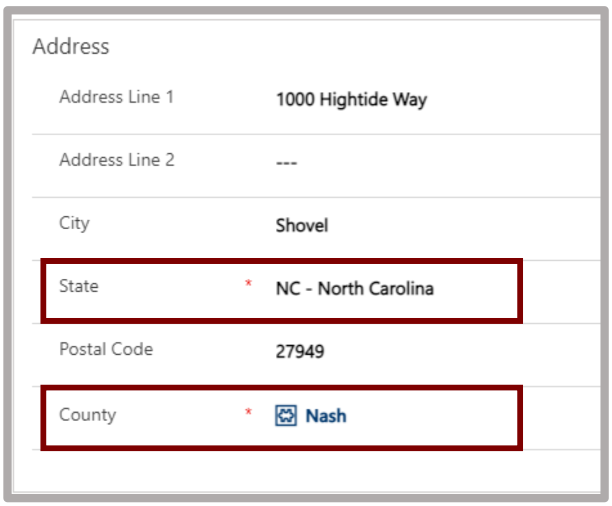
If "Other" is selected in the **Preferred Language** field, the **Other Preferred Language** field will appear.




## #4: Contact Information

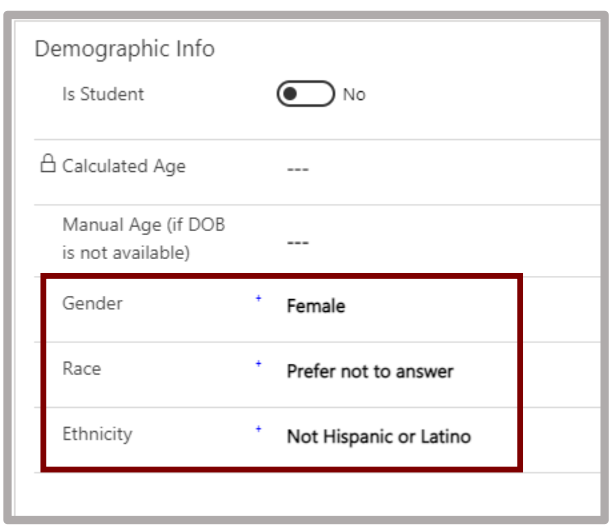
- Primary Phone *(no country code or dashes needed – this number will be used for automated text outreach if applicable)*
- Email
- Preferred Method of Contact+

*If you set Preferred Method of Contact to "Text Message" or "Email," a Primary Phone number or Email will become required.*




## #5: Address

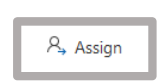
- Address Line 1 *(street address)*
- City
- State*
- Postal Code
- County* *(use county of case if not known)*




## #6: Demographic Information

- Is Student *(if known)*
- Manual Age *(if no DOB)*
- Gender+
- Race+
- Ethnicity+

**Save your work** 

to finish. If needed, you can then **use "Assign"** 

at the top of the screen and single-click "Me" to input a "User or Team" and assign this contact to them. **You're all done!**